



2024-2026 Emerging Leaders Program

Application

DIVERSITY SPONSORS





APPLICATION FOR CEPC'S 2024-2026 EMERGING LEADERS PROGRAM

Name: _____

Position: _____

Organization: _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

The Council promotes and encourages diversity in the estate planning profession at all levels.

Please Note: Application Deadline is April 30, 2024.

Optional Questions:

Race and/or Ethnicity: _____

Do you have a visible or non-visible disability? Yes No

Do you identify as LGBTQIA+? Yes No

Is there anything else not covered by the above questions that you would like for us to know about your background as it relates to diversity? _____

Credential: (Select all that apply)

J. D. Certified Public Accountant Certified Life Underwriter

Chartered Financial Consultant Certified Financial Planner American Society of Appraisers

Certified Trust and Financial Advisor TR Other _____

_____ Year Designation Obtained; OR

_____ If in process of obtaining designation, year designation expected

Overall percentage of time in current position spent on estate planning: _____

Practice Area: (Select all that apply)

Law Accounting Life insurance Financial planning Wealth Management

Trust and estate administration Planned Giving Valuation Service

Length of time that you have been involved with estate planning: _____

Other affiliations or employers related to estate planning:

Name and Position: _____

Date: _____

Address: _____

Nature of Work: _____

Please name any professional organization(s) in which you are now an active member:

1. Describe why you are interested in the estate planning field. (Please attach your response)
2. Describe your experience in the estate planning field. Include any speaking or writing opportunities and participation and leadership in estate planning organizations. (Please attach your response)
3. Briefly state why you are interested in being appointed as a CEPC Emerging Leader.
(Please attach your response)

Please email CEPC your completed application by April 30, 2024 to: info@cepcweb.org

If I am not selected for this year's EL Program, please add me as a new Emerging Member.
(Dues: Full-time Student - \$0 _____ Emerging Member - \$60 annual membership dues _____)